DOCUMENT RESUME

ED 202 895 TM 810 320

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TITLE Promoting Evaluation Utilization: The True Confessions of a Workshop Planner.
PUB DATE Apr 81
NOTE 22p.; Paper presented at the Annual Meeting of the American Educational Research Association (65th, Los Angeles, CA, April 13-17, 1981).

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Elementary Secondary Education; *Evaluation Methods; *Planning; *Program Evaluation; *School Districts; *Workshops
IDENTIFIERS *User Needs

ABSTRACT

Six workshop plans that can engage the audience in a school system while communicating knowledge about evaluation, evaluation methodology, or evaluation findings are presented. Recognition of user characteristics is the key to these workshop designs. The designs are labelled "script," "forcast," "simulated use," "skit," "needs assessment," and "critique." The following principles are included upon which workshops must be structured: (1) provide an incentive for attendance; (2) present the information in the format and context that will be encountered by participants outside the workshop; (3) provide written explanations to be used as reference materials; (4) time the workshop to allow leisurely review of the information before actual use is needed; (5) decide who would have the greatest credibility in presenting the information to the target audience; (6) never assume school district personnel or parents are acquainted with simple evaluation terms; (7) anticipate questions which might be asked during workshop sessions; and (8) gear the mode and content of the presentation to the background, interests, and educational level of the audience. A chapter on workshops and conferences taken from the author's Handbook on Communication for Researchers and Evaluators is appended. (RL)

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PROMOTING EVALUATION UTILIZATION:

THE TRUE CONFESSIONS OF A WORKSHOP PLANNER

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and
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Austin Independent School District

Paper presented at the annual meeting of
the American Educational Research
Association, Los Angeles, April, 1981

TM 810 320

Publication #80.56

PROMOTING EVALUATION UTILIZATION:
THE TRUE CONFESSIONS OF A WORKSHOP PLANNER

Freda M. Holley
and
Patsy Totusek

Austin Independent School District

ACT I

Thursday: Central City Administration Building

Administrator's Workshop

1:05 p.m. Sam Wilson's gaze focuses on the evaluator. As an experienced administrator, he wanted to learn how research could help him do a better job.

1:13 p.m. Sam's eyes assume the glazed-over look of one whose thoughts have reverted to his evening tennis game plans. The evaluator seemingly enchanted with his own voice, mires even more deeply into the intricate charm of data collection and analysis.

1:27 p.m. Sam Wilson's patience is gone. He pulls out a newspaper, spreads it out flagrantly before his face and reads. The evaluator continues weaving loops and coils of sonorous jargon oblivious to Sam Wilson's retreat. Unfortunately, less skilled administrators lacked Sam's adroit escape technique. They gazed on at the evaluator becoming by the moment more firmly entrenched in their dislike of evaluation and evaluators.

ACT II

Friday Morning: Central City Elementary

Staff Development Day

9:00 a.m. Twenty-five teachers sit solemnly in sixth-grade desks gazing expectantly on Dr. Roy Ramirez, researcher extraordinaire on classroom management strategies. The teachers are here to learn what they might do to keep the 35 rowdy adolescents they teach each hour quiet long enough to learn some basic grammar skills. Their faces are happy, expectant.

9:45 a.m. Dr. Ramirez is describing his third experiment in detail, dwelling on the difficulty of achieving interrater reliability in classroom observation. His voice is low and monotone, clearly displaying the scientific detachment of a researcher. The faces are now trapped, hopeless.

Our true confession must be that we once perpetrated similar workshop experiences on practicing educators. Our regretful refrain is that we still see such workshops happening all too often. In the decade of the Eighties every educational service is going to have to repeatedly demonstrate its value and viability. In this paper we present six workshop plans that we think have engaged the audience while communicating knowledge about evaluation, evaluation methodology, or evaluation findings. Both outcomes have prepared participants to use evaluation findings more effectively.

Before presenting these workshop plans, we would like:

- To consider some characteristics of the typical evaluation user we encounter today that we suspect from observations and conversations with other evaluators across the country to be typical of your user as well.
- To point out some characteristics of the typical evaluator that leads to ineffective workshop or meeting presentations.
- To provide a copy of a chapter on giving workshops and conferences taken from A Communication Handbook for Researchers and Evaluators (Holley et al., 1979).

The typical user of evaluation information in a school system is likely:

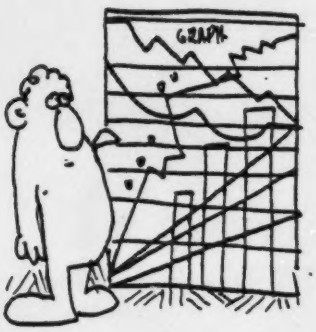
- To be jaded with workshops and meetings.
- To dislike bad news.
- To have little if any understanding of even the most basic evaluation terms such as means, percentiles, or significance tests.
- To be unable to read complex graphs.
- To be somewhat afraid of numbers and math in general.

Most evaluation users will, however:

- Enjoy sessions in which there is a chance to discuss or solve problems with their peers.
- Want to be able to understand anything directly related to their job role.
- Sincerely desire specific information or direction about what can be done to improve their standing in that role.

These characteristics are not invariable, but they occur frequently enough that the evaluator will be safer in preparing workshops for this typical participant. It is

probably wise to admit also that these characteristics are unchangeable as far as the evaluator is concerned. It seems to us that an evaluator can more effectively use energy in direct communication of essentials than in fighting unwinnable battles of personality change. Acceptance will probably be difficult, however, because of the contrasting characteristics we observe in the typical evaluator or researcher. That is, the typical evaluator:



- Enjoys looking at data and trying to interpret it.
- Has a love of precise and descriptive information.
- Heartily dislikes "putting on a show" or serving as a workshop leader. Most evaluators, particularly beginning evaluators, have little awareness of how truly limited the typical user is in terms of understanding evaluation terminology and has almost no training in how to communicate with this type of audience.

Recognition of the user characteristics is the key to our workshop designs. Evaluators, however, must simply learn to overcome their reluctance. Some of our better designs are illustrated below. Following these examples, the general principles we believe they illustrate are outlined.

Workshop A: The "Script" Design

Need: The school district is faced with a new state law requiring that school-by-school test results be published. It is deemed wise for principals to present school and district results to their faculties and PTA's a couple of days prior to the release of these scores to newspapers. Principals must be quickly trained to present such data along with terms and definitions.

Solution: A script (Lee, 1976) is prepared leaving blanks into which each principal simply plugs in his school's data. Accompanying overhead projection transparencies are provided, some designed in such a way that the principal also has only to darken in the appropriate lines for his school. The Superintendent presents a role model to the staff by giving an enactment of the script for all principals using a simulated school example.

Analysis: Principals did very well and little furor resulted from the data release. In the process, many staff members as well as parents learned testing terms, the relationship of S-E-S factors to test results, and became more familiar with school and district data. This basic script approach has many other potential applications. We frequently volunteer to script presentations for other central staff, community groups, and association presentations. Anytime important information must be communicated through a set of individuals to another set of individuals, this is a good technique. We have also used this with accompanying filmstrips and slide-tape materials as well.

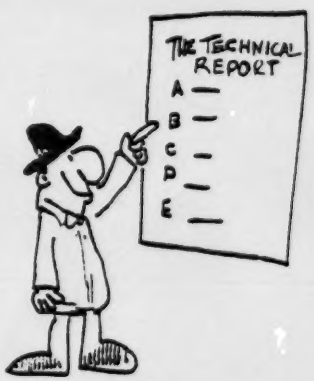
Workshop B: A "Forecast" Design

Need: For several years State Compensatory Education (SCE) funds were made available to the eight sixth-grade school centers. The funds were to be used to improve the achievement of students who scored below the national average on standardized reading and math tests. The academic progress of SCE

students was assessed by comparing pre- and posttest scores on the California Achievement Tests (CAT). Each spring, the SCE principals received a technical report showing the statistical analyses performed on the CAT data, and the extent to which the SCE students had met their achievement objectives.

Over time it became apparent that the SCE principals did not clearly understand such terms as "standard scores," "median," "mean," and "gain score," and as a result had difficulty interpreting the data provided in the technical report. The principals were actively involved in the evaluation and desired to know the results before they were presented to the Board; however, the report had to be delivered to the Board during summer months when they were on leave.

Solution: The evaluator of the SCE project conducted a workshop for the SCE principals approximately one month before the distribution of the technical reports. The workshop was based upon the examination of a seven-page reference document. The document previewed the statistical procedures that would be used to analyze the CAT scores for the SCE students. The same format was used throughout the reference document to explain each of the analyses. This format involved:



- A statement of the evaluation question for which the analysis was relevant.
- A copy of the table that would be used to report the results; and
- Any explanations (including definition of terms) needed to interpret the table correctly.

The principals were encouraged to use the reference document to help them take full advantage of the data received in the technical report. Their copies were mailed to them in early summer before the Board received the report.

Analysis: The workshop permitted the presentation of data needed for interpretation without the interfering emotions aroused by actual data. Principals better understood the final report as a result.

Workshop C: A "Simulated Use" Design

Need: Principals are receiving teacher evaluation summary data from a new personnel evaluation system for the first time. These data should be used for analyzing their performance as a personnel evaluator against the district norm and also as a tool for planning campus level inservice. New printouts and new data with new terms and symbols were involved.

Solution: A set of simulated data for an imaginary elementary and high school is presented. The first session of the workshop is used to explain how to read the simulated graphs and printouts. An overview of the district results was also presented. Then, principals, instructional coordinators, district administrators and evaluators were divided into small working groups led by district personnel officers. These officers were responsible for implementation of the new evaluation system. In these groups, participants brainstormed conclusions from the data for "River City Elementary" and "River City High." The concluding activity brought the staff back together to share experiences and receive their own school's data.

Analysis: The principals could generally read their printouts and graphs. Only the first step toward actual use had been taken, however. The workshop received good evaluations. We have used simulated data a number of times. This permits individuals to attend to the formats and terminology without interference of concern about their "personal" data.

Workshop D: The "Skit" Design

Need: School staffs were being required to implement a "MBO" type activity involving the setting of school goals. The goal setting requirement involved matching school goals to district goals. A good knowledge of district and campus data was required for establishing objectives. Considerable animosity was being expressed by teachers to the entire activity and many questions were being generated which principals felt unable to answer.

Solution: A mock faculty meeting was designed for presentation at a general principal's meeting. An evaluator played a principal and fielded gripes and questions. Responses were typed and distributed for principals to take back and use on their campuses.

Analysis: This design was useful where specific data communication was not involved. Some principals complained that it was easy enough for an evaluator to answer such questions so glibly, but agreed that the model and handout helped them.

Workshop E: The "Needs Assessment" Design

Need: Parents of Title I students need to receive evaluation reports and participate in program planning under guidelines, but the data are often too complex

to understand. Formal presentations are not well received.

Solution: A needs assessment instrument that presented important data to parents in a simple verbal, visual format was prepared. Parents were brought together and worked in small groups to consider the information. They peeled off little labels bearing needs statements translated to program activities such as "elementary math program" and applied them to numbered circles corresponding to their priority rank for resource allocation.

Analysis: Evaluation information came to parents at a time when they could use it meaningfully. They were not required to receive it passively, but could actively discuss and apply the information. Such a general approach to supply data at important planning junctures is of general utility.

Workshop F: The "Critique" Design

Need: A new approach to evaluation needs to be communicated to a relatively sophisticated audience.

Solution: A session using the new approach or new materials is held. Participants are invited to assist in "critiquing" the model.

Analysis: This approach has many applications. It can be used not only to introduce a new model, but also to identify areas of difficulty in implementation or communication.

In Conclusion: Principles

Attached to this paper is a chapter on workshops and conferences taken from the Handbook on Communication for Researchers and Evaluators (Holley et al., 1979).

This gives some of the general notions upon which we believe workshops must be structured. Below are other principles that we have deducted from the literature and from such workshop design experiences as we have described above.

I. Provide an incentive for attendance. Base the workshop activities upon the job responsibilities, needs, interests, or ambitions of the participants.

II. Present the information in the format and context that will be encountered by the participants outside the workshop.

III. Provide written explanations to be used as reference materials following the workshop.

IV. Time the workshop to allow leisurely review of the information before actual use is needed.

V. Decide who would have the greatest credibility in presenting the information to the target audience. If someone other than an evaluator presents the information conduct a model workshop for the presenter and design structured workshop materials for the presenter's use.

VI. Never assume school district personnel or parents are acquainted with simple evaluation terms, or that they can read charts and graphs without assistance.

VII. Anticipate questions which might be asked during workshop sessions. Be prepared to answer the questions or to educate other presenters in giving informed responses.

VIII. Gear the mode and content of the presentation to the background, interests, and educational level of the audience. Do not assume the same approach will work equally well with parents and school district personnel.

IX. Persevere! If once you fail, try, try, again!

References

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Lee, A. A suggested format for elementary and junior high school principal presentation of school-level California Achievement Test data to community groups. Austin, TX: Austin Independent School District, 1976.

Workshops and Conferences

Evaluators and researchers often find that they are called on to lead workshops. Workshops are different from work groups such as committees in that their main purpose is to provide learning opportunities for participants. Workshops differ from presentations in that they call for active participation by the learners.

Evaluators or researchers are usually asked to lead workshops for one of several purposes. The participants may want to learn about current research and evaluation findings. They may wish to learn more about current or planned research/evaluation or testing activities. Finally, they may just want to learn more about what evaluation and research are and how these activities fit into planning and other decision-making activities.

The evaluator requested to give a workshop has an opportunity to fulfill the purposes and needs of the participants. There is a further opportunity, however, to meet some ulterior purposes for research and evaluation as well. A good workshop can communicate the researcher's and evaluator's concern with the interests of the educator. It can make the participants feel closer to the researcher and evaluator who are often considered distant, number-oriented, ivory tower types.

Whether or not direct and indirect purposes of a workshop are served, however, will depend on the overall success of the workshop. Giving a successful workshop

. hard work. It requires careful planning, imaginative and thoughtful design, and persistent follow-up.

CAREFUL PLANNING. The first requisite is knowing the personal interests, needs, and characteristics of the participants. If possible, do a survey of all participants as soon as they are identified. Find out their current level of knowledge and awareness about the topic. Also, follow up the mail questionnaire with a few personal contacts if possible. Where individual participants cannot be identified in advance, find out as much about the group as possible. If possible, you might go out and observe them in a setting where they are likely to be performing tasks related to the planned workshop topic. A sample survey for a workshop on desirable teaching practices is shown on the next page.

Use the information to structure the workshop. Place individuals into desirable groups by skill level, by interests, by position, or by any other relevant characteristics.

- Plan varied activities for the appropriate background or skill level of the group.
- Use information gathered from the group in examples, for illustrative references, and to create rapport. Use the participant's type of vocabulary.
- Establish the most appropriate physical arrangements for the group. For example, don't arrange a luxurious setting for a group of teachers currently angered by a low salary increase.
- Make sure the room is not too large or small for the number of participants and that it can be darkened if necessary for slide or videotape presentations.
- Allow plenty of time (at least an hour) to get ready for the session. Check the physical arrangements, materials, and equipment. Have scratch pads and pen-

cils available for each person. Check equipment for placement and operation before the workshop. Have extra bulbs on hand for audiovisual equipment. An extension cord frequently comes in handy as well.

- Arrange tables for small group (from 6-8) interaction so that maximun participation can occur.
- Make sure the presentation area is clearly visible to all participants.

If you can't identify the workshop participants before it begins, you can still get information on their background, interest, or ability-level by giving them a short questionnaire to fill out as they enter. Have an assistant tally and use this information for grouping purposes or for selecting exercises. You may even want to have the participants discuss their responses aloud as a way of warming up the group.

Prepare a written agenda with times for all activities and breaks. Most groups function better with a set structure. Announce this orally to the group. However, make sure the agenda is flexible enough to adjust for the needs and interests of the participants. (see sample on next page).

IMAGINATIVE AND THOUGHTFUL DESIGN. Workshops are almost always longer than 30 minutes. It is difficult to hold the attention of an audience for longer than 10 minutes. Few adults can attend to an activity in which they are not actively involved for much longer than 20 minutes.

These notions indicate that you must put a great deal of variety into the workshop. A number of different types of activities should be used during the workshop. Necessary imparting of information or lecturing should be combined with visuals such as slides, overheads or flipcharts, wherever possible. These extemporaneous presentations by the facilitator should be only as long as it takes it to get the message across. Outline what you want to say, give it to a friend, or record it. Edit it. Try to keep each oral presentation you plan to make brief; aim for 10 minutes or so. Allow for questions within longer presentations or after short ones. Intersperse oral presentations amid activities calling for more participant involvement; activities which illustrate and reinforce the point you are trying to make.

PLEASE ANSWER ANONYMOUSLY AND AS CANDIDLY AS YOU CAN:

SAMPLE QUESTIONNAIRE TO WORKSHOP PARTICIPANTS

1. Why did you sign up for this session?_____

_____

_____

2. What is your general attitude toward "educational research?" (check one)

☐ a. I think it has helped solve many educational problems.

☐ b. I think it could solve problems in education because it is growing stronger each year.

☐ c. I haven't really made my mind up about it yet.

☐ d. It sometimes sheds light on a topic or two, but in general it doesn't usually yield a good return for the money it takes.

☐ e. I think all educational research is a total waste of money, energy, and time.

3. If "educational research" could answer any question you asked of it, what question would you ask?_____

_____

_____

4. Have you ever conducted a research study, no matter how small? ☐Yes ☐No

If "yes", why did you do it?_____

_____

5. What causes you the most concern during the school day?_____

_____

_____

6. Approximately how many college courses have you had in statistics and/or math?_____

PLEASE RETURN THROUGH THE SCHOOL MAIL. 17

ADMINISTRATORS' STAFF DEVELOPMENT WORKSHOP, AUGUST, 1979

A. B. 301.02
Anderson High, Room 230
August 2, 1979
9:15 - 10:30

Professional Evaluation Ratings: By-School Summaries: What do they mean? How do you use them? (Secondary)

AGENDA

1. Introduction to the Districtwide Evalution Data - Large Group Discussion.

   Led by David Hill.

   20 minutes

2. Small group exercise to discuss Capital High School data and plan staff development based on the data provided.

   Led by group leaders.

   40 minutes

3. Individual School Data - Each principal will receive a packet with the evaluation summary data for his/her school as well as questions to consider as guides to interpretation.

   Led by David Hill.

   15 minutes

- Simulation games
- Simulated tasks
- Real tasks
- Role playing
- Taking a test
- Skits
- Preparing plans
- Spending "make believe" budgets
- Discussion of issues
- Writing responses to questions about topic

If you are using simulated activities, put your best imagination into dreaming up interesting, different, unique activities. If you aren't good at this, find someone who is to work with you. Bored participants don't learn!

It's also a good idea to prepare a bibliography on the materials used or related to the workshop to hand out. Most people appreciate this, and some may be disappointed if they don't receive one.

FACILITATING THE WORKSHOP. Greet the participants as they enter. Introduce yourself and give each person their nametag. Hand out blank name tags for them to fill out if it is not possible to prepare them ahead of time. People are more likely to address each other if they know who they are and where they are from.

Try to get the mailing address of all of the participants. You may want to send a list to each participant if it seems appropriate.

Help create a friendly atmosphere at the beginning of the workshop by telling everyone that all comments are welcome (within time constraints of course)!

Don't hand out written materials unless you want people to read them then and there. Many people will tend to read the materials and ignore the speaker.

Start and end on time! Suggest another meeting time for those who are interested, but don't keep the whole group over the specified time.

Even when you've designed activities that you're sure will be knockouts, remember to watch participants alertly at all times. Don't be so in love with your own planning that you don't recognize that your audience isn't being knocked out. Read your audience. Your planning should have alternatives that you can bring in for such emergencies. Follow your intuition about whether or not to change pace or skip an activity. For group activities select your group leaders carefully. If the activities you are planning are very complex, give your group leaders some advance training.

Monitor group discussions. Give entree to those who look like they want to speak but can't get a word in edgewise.

Don't forget to act as a facilitator of discussions. Summarize what has been said. Contrast or compare ideas presented. Ask for more information if a comment is not clear. Define or ask for definitions of words used by others which may not be clear to the whole group. Ask thought-provoking questions and request examples from the participants.

Sometimes discussions simply get too lengthy or stray from relevant topics. Sometimes one participant tries to dominate the workshop with interminable anecdotes or with their expert advice on the best way to do everything. It is important for the facilitator to control the extent of the participants' input without belittling or embarrassing anyone. Here are some techniques that might help.

- Direct questions or comments to specific participants.
- Announce a time limit for each speaker.
- Carefully place an interruption to redirect the workshop back on track.
- Suggest a time and place for further discussion after the regular session.
- Refer participants to a book or other materials listed in the bibliography.
- Remind participants that they can provide suggestions for improvements in their evaluation of the workshop. Have an evaluation form ready.

PERSISTENT FOLLOW-UP. If your workshop fulfilled its purposes, your audience will like you and be interested in your work. They will have some valuable knowledge and skills.

Take advantage of your toehold. Keep in touch with the participants. Send them feedback on the workshop evaluation. Let them know about new developments related to your topic. They can still be an audience for you! Ask them to do favors for you. They can be brought in as group leaders for your next workshop. They can feed information to others.

They can feed information to others. They can advise you in problem areas.

The more potential trainers you can train, the more you can expand your circle of influence. Who knows? Some members of your audience may begin to adore evaluation!

CONFERENCES

Conferences are actually a series of workshops which include a number of different speakers or presenters. Conferences combine these workshops under a unifying theme. Additionally, conferences are usually less specific in dealing with the needs of any given organization. The best workshops are carefully planned to meet some identified need of people within the organization. Conferences, on the other hand, offer a smorgasbord of information from which people can sample, and introduce them to a variety of new ideas or strategies. Unlike presenters at workshops, the conference presenters more often come from outside the sponsoring organization and usually do not tailor their presentations to reflect any specific organization.

Conference participants are usually either already informed on the topic or are motivated to pursue topics of interest to them. This does not usually describe the audiences that most evaluators deal with and the cost of conferences is usually more than an evaluation budget can handle. Therefore, conferences are usually not as useful for evaluators as the more flexible, often less formal, and generally less expensive workshop format. However, at some point a conference may be just what you need.

Setting up a conference is a time consuming process. The book listed as a reference is an excellent source of information on setting up a conference.

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